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ABSTRACT

As a first step towards resource sharing among libraries in the Cleveland Area Metropolitan Library System (CAMLS), a unique method, called the Site Appraisal for Area Resources Inventory (SAFARI), was developed to examine the library collections. This approach was different than others in that collections were compared by experts in a specific field. After a committee was organized, specific libraries which had significant collections were visited; other libraries with pertinent materials, but perhaps smaller collections, were canvassed through questionnaires. Six different subjects were studied in this manner--education, music, business, local history and genealogy, religion, and nursing--and the findings were published in a written report. Since the technique provides a fairly quick inventory of resources, the information can be used by faculty members and individuals working in the subject area as well as by librarians. Furthermore, the compilations provide the beginning steps towards delineating subject responsibilities to specific libraries for the purposes of joint acquisition programs and eventual resource sharing. (Author/JD)

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Final Report

Project No. 475AH60081
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Design and Testing of a Method to Reach Agreement for Responsibilities in Collection Building Among Libraries

Prepared by Gretchen Redfield

Cleveland Area Metropolitan Library System
for the
Library Council of Greater Cleveland

Cleveland, Ohio

"PERMISSION TO REPRODUCE THIS MATERIAL HAS BEEN GRANTED BY

Nancy Wareham

TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC) AND USERS OF THE ERIC SYSTEM."

January 1978

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PREFACE

During the course of this Project, a series of staff changes occurred. Dr. Dorothy Sinclair, the Project Director, served as Executive Secretary of the Cleveland Area Metropolitan Library System (CAMLS) until July 1977. Although Nancy Wareham was appointed Executive Director of CAMLS in August 1977, Dr. Sinclair continued to serve as Project Director. Miss Wareham provided general supervision to the Research Librarian.

Mark Gormley served as Research Librarian until his resignation in June 1977. Gretchen Redfield was hired in September 1977 to complete the work on the project and to submit the final report.

ABSTRACT

Resource sharing is becoming more prevalent between libraries in a region. The Library Council of Greater Cleveland is a multitype cooperative who has been interested in this concept for several years. Before embarking on a comprehensive plan, however, it was decided to first examine the collections which already existed in the Cleveland area.

A unique method was developed, called the SAFARI or Site Appraisal for Area Resources Inventory. This approach was different in that collections were compared by experts in a specific field. After a committee was organized, specific libraries which had significant collections were visited. Other libraries with pertinent materials, but perhaps not as large a collection, were convassed through questionnaires. The findings were published in a written report. Six different subjects were studied in this manner: Education, Music, Business, Local History and Genealogy, Religion, and Nursing.

This technique provides a fairly quick inventory of resources. The information can be used by Faculty members, individuals working in the subject area, as well as by librarians. Furthermore, the compilations provide the beginning steps towards delineating subject responsibilities to specific libraries for the purposes of joint acquisition programs and resource sharing.

SECTION I - INTRODUCTION

It is a well established fact that the costs of operating a library are soaring, while the corresponding budgets are unable to meet these financial obligations. The time has arrived when discussion on the merits of cooperation has been superseded by debates on how to establish the proper mechanism for interlibrary workings. The need to expand a library's holdings to include the resources of an entire region has recently taken on a sense of urgency. Libraries in a metropolitan area, in contrast to those in rural locations, have the benefit of a relative proximity to one another. This closeness geographically should enhance the opportunities to share materials.

Many libraries strongly support interlibrary loan and are willing to participate in a regional project to encourage such programs. The difficulty arises when the idea is expanded to include coordinated selection and acquisition. This encompasses only those items which are seldom utilized or are quite expensive. The end result of increasing the total resources of an area and making them accessible to a community should be of prime importance. There exist however, numerous obstacles which must be overcome first.

The technology is available for recording on-line a library's holdings, individually or collectively. The costs are decreasing yearly. There are numerous improvements which are still necessary for automation to be at the level which many libraries desire. However, the lack of technology cannot be used as an excuse for the failure of libraries to engage in resource sharing programs.

The slowness of libraries to act can be traced to the human factor, rather than to any shortcomings of automated systems. Every institution is responsible to a specific group of individuals, each of whom has his or her own ideas. When libraries come together to form a multitype cooperative, such as the Cleveland Area Metropolitan Library System of the Library Council of Greater Cleveland,* all of the pressures and interests which influence each library are combined. This tends to limit the amount of comprehensive plans which can be tackled, and favors a step by step approach to changes.

It cannot be assumed that all libraries are willing to give up their autonomy. Many are apprehensive concerning the idea of relying on others in a community for certain items. It would be ideal if each library could house practically all of the materials which its clientele desires. Library boards and communities often have become accustomed to this type of service. Unfortunately, the realities of the current situation dictate the economic infeasibility of continuing to do so.

* The Library Council of Greater Cleveland Functions as the governing board of the Cleveland Area Metropolitan Library System (CAMLS), a multitype metropolitan library cooperative funded by LSCA Title III. CAMLS is responsible for coordinating cooperative activities for the Library Council. The term CAMLS will be used throughout this report.

Patrons, likewise, need to be educated to the fact that interlibrary cooperation will benefit them. It is imperative that a user understands that materials, which a library can no longer afford to purchase, will be accessible through another library in the area. Faculty members are especially prone to reject this idea. Nevertheless, the ability to retrieve an item from another location is infinitely better than not receiving the information at all.

Careful planning is a necessity for cooperative purchasing to succeed. Too often enthusiasm for this idea has overshadowed the importance of obtaining the proper expertise to coordinate such an effort. The result can be a greater sense of disillusionment and more resistance to such a plan in the future.

Another fallacy has arisen in regard to resource sharing. Pooling materials does not automatically necessitate a substantial financial savings. With the rising costs of monographs and journal subscriptions, sharing might merely signify retaining the previous level of purchasing power. The important point is that through a carefully planned cooperative system, certain materials will be assured of being purchased in the area and available to the public. Libraries must look beyond a desire to retain self-sufficiency to the matter of fulfilling the patron's needs in every way possible.

Cooperation between libraries is not unknown to the Library Council of Greater Cleveland. Since 1970 an interlibrary loan operation has been in effect. Several years ago the nineteen member libraries expressed a desire to increase their sharing of resources (See Appendix A). As a result, a grant was obtained to look into the feasibility of establishing some mechanism for coordinating this type of endeavor. The study began September 1, 1976, and concluded November 30, 1977, after receiving a three month extension.

Rather than beginning with a plan for resource sharing, it was decided that the first step should be an inventory of the existing materials in the Cleveland area. The strengths and weaknesses, the gaps and the overlapping of collections could be discovered. Once a library was found to be strong in a subject, it would be feasible to ask the library to continue purchasing materials in that field. Therefore, resource sharing would be the logical corollary of the inventory process.

Before such an inventory could occur, two studies were conducted of holdings among LCGC members. The source used was Choice, a journal published monthly by the Association of College and Research Libraries, which is a division of the American Library Association. The April 1975 issue was checked in January 1976, and the April 1976 issue was checked in January 1977 on OCLC. The purpose was to discern what was and what was not available in the member libraries. In no way was this intended to discredit a particular collection. There are many limitations of the study, but it did prove that this system is helped by each of its components. None of the libraries can stand alone and attempt to fill all of the requests from patrons.

With this idea in mind, a unique method was developed, called the SAFARI or Site Appraisal For Area Resources Inventory approach. Subject areas, such as Education and Music, which were deemed important for locating resources were identified. A committee comprised of librarians who were experts in the field was selected. Member libraries were primarily represented, including faculty members from a participating institution, as well as specialists from the Cleveland area. Each group worked differently, depending on the type of subject matter and the make-up of the committee itself.

The libraries which were determined to have the largest or most unique collections were visited by the group. Using standards which were established beforehand, the committee examined the specific subject collection. Each subject was divided into sub-topics, so that an area such as Childhood Education would be a strength, rather than Education as a whole. This information was included in the final report as 'Subject Access'. Information Sheets were then distributed to the pertinent libraries. Specific information and library policies were requested. The data which was cumulated from these was included in the report as 'Library Profiles'.

The SAFARI Reports were published and distributed to the committee and to the member libraries by the CAMLS Office. Other institutions, interested faculty members, and individuals in the community to whom the information would be useful could also receive copies. Six were completed: Education, published in April of 1976; Music, published in September of 1976; Business, published in April of 1977; Local History and Genealogy, published in June of 1977; Religion, published in June of 1977; Nursing, published in December of 1977.

A natural outgrowth of three of the SAFARI Reports was a Union List of Serials. The fields of Business, Music and Education used either union lists which had been prepared several years ago, or an established bibliography from which a library could check its holdings. This type of information served as a beginning, and therefore involved more of an updating or checking process, rather than starting with nothing and compiling a comprehensive union list.

The final step was to distribute questionnaires to the Directors of those libraries which were determined, by means of the Education SAFARI Report, to have strengths within the field of Education. The questions centered on the feasibility of the library maintaining the subject strength and of reporting any changes or alterations to a central location. The results comprise the information needed to legitimately take the next step towards resource sharing in the Cleveland area.

SECTION II - METHODOLOGY

Three phases were involved in completing the study. Briefly, these encompass 1) demonstration of the problem, and need, through factual evidence 2) orientation and involvement of library and institutional decision-makers, and serious users 3) planning for, and implementation of, joint acquisitions policies and procedures in designated subject areas. (1)

PHASE I

In order to demonstrate that each library of CAMLS must rely on the others who are members, a study was conducted to determine the amount of duplication and to "obtain an indication of the extent to which libraries might reasonably expect to find books requested on interlibrary loan within the System."(2) The plan primarily supports an interlibrary loan system, which does directly affect resource sharing. If the libraries agree to a planned method of pooling their materials, then interlibrary loan will be the means to accomplishing this goal. On the other hand, since an interlibrary loan system is already in existence among the CAMLS members, its operation must be efficient so that libraries will feel confident in using it as an integral part of resource sharing.

The study was conducted of holdings among CAMLS members. The source used was Choice, a monthly journal published by the Association of College and Research Libraries, which is a division of the American Library Association. The April 1975 issue was checked in January of 1976, and the April 1976 one was checked the following January. The OCLC data base was searched for the holdings. There were problems with using OCLC. Some libraries either were not on-line yet or had recently become members. Since libraries are constantly adding to the data base, the discoveries of one day might change considerably by the next. Nevertheless, OCLC was determined to be the most efficient means to use for purposes of this study. Alterations were made accordingly.

The holdings of two academic libraries and two public libraries were hand-checked. The first two were not members of OCLC, and the latter had just come on-line when the study began. Four of the public libraries were not listed in the 1975 check, since their Directors felt that a hand-check would not be profitable. By the 1976 check, however, all were listed, including one who had joined OCLC in the interim.

1. Dorothy Sinclair, "Design and Testing of a Method to Reach Agreement for Responsibilities in Collection Building Among Libraries," Cleveland, 1976, p. 16. (Grant Application - Typewritten.)

2. Cleveland Area Metropolitan Library System, Holdings in Selected Cleveland Area Libraries of Titles Listed in CHOICE April, 1975; April, 1976, CAMLS Occasional Publication, Number Four (Cleveland: Cleveland Area Metropolitan Library System, 1977), p.i.

The study is quantitative in nature. The report is divided into subject areas, in accordance with those listed in Choice, Each field is divided into four groups:

1) the number of titles in the issue of Choice
2) the number of those titles which are held by CAMLS as a whole
3) the number of titles which are held by each member of CAMLS where applicable
4) the percentage of the sample titles held by each library, presented in the form of a graph

All of the information which was gained from these checks was incorporated into a publication, Holdings in Selected Cleveland Area Libraries of Titles Listed in Choice.

PHASE II

The SAFARI technique was derived as a means of evaluating the existing library resources in the Cleveland area. Its uniqueness stems from having collections compared by experts in a specific field. The procedure of visiting libraries enabled the individuals to decide whether or not a library truly had a strong subject collection. Often the criteria by which two libraries judge their own materials differs greatly. There is also the problem of evaluating a specific area in different types of libraries. Academic and public libraries do not collect exactly the same types of items, and so each must be examined accordingly.

SAFARI Reports, Education and Music, were completed before the grant funds were received. These served as test models. The same basic procedures were adopted by the SAFARI committees which followed. Modifications were certainly made by each group, depending on the subject matter and the ideas of the committee itself.

The first three topics, Education, Music and Business, were selected due to their known subject strengths in the region, in addition to input from various Library Directors. Following their completion, a survey of the Library Resources Committee was conducted by the CAMLS Office to determine what other subject areas should be examined (See Appendix B). As a result, Local History and Genealogy, Religion, and Nursing were the last three reports to be completed.

Initially, a group was brought together by the CAMLS Office. Specialist librarians, both from member libraries and from other institutions, and faculty members, comprised the committees. These individuals were usually familiar with the materials in the region. As a result, it was often difficult not to make the report too comprehensive, which would have involved more time and effort than was feasible, or perhaps too esoteric, as far as terminology and the like is concerned. It is important that any librarian, regardless of his or her subject orientation, be able to easily use the completed publication.

This newly formed group began by holding an organizational meeting, at which time a chairperson was chosen. Details were worked out and standards, by which the committee could evaluate a specific collection when visiting a library, decided. The subject field was divided into sub-topics, and each person was usually given several areas to examine in each library. This helped to provide a more uniform evaluation process. The sub-topics were sometimes taken from standard subject headings list, or from a credible bibliography in the field.

Various libraries were chosen to be visited. They were selected on the basis of having a large collection or a unique one. The number of libraries to which the committee travelled was determined by the subject area. Each visit averaged approximately an hour, wherein twenty minutes was devoted to a description of the collection, and 30-45 minutes to examining catalogs and collections. The trips were scheduled closely together, so that the process of comparison would be facilitated.

Sufficient amount of time was allowed between the visits and the last meeting. This was to enable the committee to write up their findings. The written report was compiled at the final session.

In the interim period, Information Sheets or questionnaires were distributed to certain libraries which were believed to have sufficient collections in the subject area. The questionnaires for each SAFARI also differed. Beginning with the third project, Business materials, all of the member libraries of CAMLS were canvassed, so that any pertinent information could be found. Unique and significant collections were then included in the final publication.

The report was usually divided into three sections: the foreward or preface; subject access; and the profiles. The foreward contained any information which was relevant to that particular SAFARI Report. Most of the publications contained some form of the following explanation of the SAFARI method.

> "SAFARI" (Site Appraisal For Area Resources Inventory) is the designation given to a technique CAMLS is using for collection study. Under the general supervision of the Library Resources Committee, topics for collection study are identified. Specialist librarians, those who serve users and those who are in charge of collection development in the designated subject area, are identified. This group plans and carries out the SAFARI, in which they visit area collections in the specified subject area, evaluating and describing them. After the visits, the SAFARI Team has a session in which notes are compared and consensus taken to arrive at the strengths of each collection. A document is prepared, and published by CAMLS, describing and evaluating the region's bibliographic strength in the subject field studied.

Part I included the subject strengths. These were decided upon by the committee after visiting specific libraries. Part II, 'Library Profiles', incorporated the Information Sheets. Only those institutions which contained materials in the field were listed. After all member libraries were asked to complete a questionnaire, omission from Part II was synonymous with having no significant materials on that topic.

After the report was published, it was distributed by CAMLS to all of the member libraries, the persons on the committee, and other individuals to whom this information would be beneficial, such as faculty members. It was planned originally that the compilation could be used for interlibrary loan, acquisitions, and reference, although few libraries utilize it for all of these purposes.

The Union Lists of Serials were compiled by the same committees who prepared the SAFARI Reports. The main emphasis of the SAFARI Reports was on monographic types of materials, and therefore union lists did not accompany each report. Either a former union list from some of the area libraries was updated and expanded, or an established bibliography was used as the basis, so that a library could check its holdings against a set list. None of the union lists claim to be totally comprehensive. It was felt, however, that whatever information could be gathered together would prove to be more beneficial than none at all. In several of the forewards to the publications it states that further work is necessary. This type of endeavor is an entire project by itself.

An in-depth look at the procedures for conducting a SAFARI can be found in The SAFARI Method of Collection Study and Cooperative Acquisition of a Multi-Library Cooperative; A Manual of Procedures, by Dorothy Sinclair. Examples of the Information Sheets which were distributed to the libraries, as well as other pertinent information, are located in that publication, which accompanies this report. The SAFARI Method of Collection Study and Cooperative Acquisition was put out separately so that it could be distributed to other groups which are planning to use the same technique in their region.

PHASE III

In order to evaluate the desire to continue working towards resource sharing, a questionnaire was sent to eight Library Directors (See Appendix C). The Education SAFARI Report was used as an example, and if a library was listed as having a specific subject strength, then the Director received a form. For each field listed, a questionnaire was distributed. Therefore, each Director received more than one, with a total of sixty being dispersed.

SECTION III - RESULTS

PHASE I

The study of holdings within CAMLS member libraries using the journal Choice as the base proved that each library is a necessary component of the whole. There were limitations concerning the examination. After checking OCLC for the holdings of Cleveland State University, however, and then having the library do the same in-house, only a 1.6 percentage of error was found. This does indicate that the majority of holdings were probably located.

The largest holder among the members was found to have less than half the number of items held by the system as a whole. In one instance, Cleveland State University owned forty items not located elsewhere. When the following pieces were added; 8 found at Baldwin-Wallace, 9 at Cuyahoga Community College, 4 at Cleveland Health Sciences Library, 17 at John Carroll, 5 at Lakewood Public, it could be seen that the sum of the smaller unique holdings was greater than those possessed by only one library.

PHASE II

CAMLS published six SAFARI Reports and three Union List of Serials. These include the following:

SAFARI I - Education
published April, 1976

SAFARI II - Music
published September, 1976

SAFARI III - Business
published April, 1977

SAFARI IV - Local History and Genealogy-published June, 1977

SAFARI V - Religion
published June, 1977

SAFARI VI - Nursing
published December, 1977

Union List Number One
Business Services

Union List Number Two
Education Journals

Union List Number Three
Music Journals

All of the Union Lists were published in 1977

As mentioned previously, the Union Lists were outgrowths of the SAFARI Reports. In each case a previous compilation of journal holdings was updated and printed separately, or a set list was checked by each library. A great deal of time and effort is necessary if a comprehensive periodical list is to be compiled. With this idea in mind, the other three committees agreed not to publish such a list. This is not to exclude the fact that these compilations are useful. The main emphasis of the SAFARI technique, however, is not on the production of union lists.

One of the benefits which the participants on the SAFARI Committees gained was the interaction between the subject specialists which served on the group. A great deal of information and ideas was exchanged. A feeling of esprit de corps developed between many, which has resulted in direct benefits to various libraries in the area of interlibrary cooperation. It is much easier and usually more profitable to call a colleague whom an individual has met. Furthermore, the exchange of pertinent materials has also developed.

All six SAFARIs followed basically the same procedures. The differences appeared primarily in the handling of the details and the actual format of the written report. The committee working with Business materials found that they had amassed too much information. Several have stated the frustration of not being able to continue the job and to put out a truly comprehensive study. Unfortunately, that type of in-depth compilation was not the intent of the SAFARI approach.

The group which worked on the Nursing Report faced some new difficulties, some which were also experienced by the Local History and Genealogy Committee. This subject was the first that was truly unique, in that nursing materials are not necessarily found in every library. As a result, only one of the member libraries of CAMLS had a sizable collection. The other large collections were housed in institutions, primarily in hospitals, which could not make their materials available to the public. The committee came to the conclusion that there was little benefit in comparing the strengths of collections which were not accessible to anyone but specific employees. Therefore, a SAFARI in the strictest meaning of the term was not conducted. A concise inventory of resources in the Cleveland area was accomplished, however.

A positive side effect of searching to locate materials was realized by the Nursing SAFARI Committee. One college library had been working under the assumption that the nursing collection on campus was located at the Nursing School. It was discovered that no permanent collection was available to students or faculty. The library is looking into the possibility of purchasing materials for the field in the future.

Telephone Survey

Before the last report was begun, a telephone survey was conducted by the CAMLS Office (See Appendix D). The purpose was to discover whether the five reports were actually being utilized. A total of eighteen academic librarians and twenty-six public librarians were polled*. A

* The academic librarians polled represented 41% of the total, and the public librarians were 49%. This resembles the division of libraries in CAMLS wherein the academic libraries comprise 53% of the total, and the public libraries are 59%.

librarian was called at random in each of the member libraries. Usually the individuals were Reference Librarians, but a few people in Acquisitions/Collection Development and Interlibrary Loan were also contacted. This approach was chosen so that no one would be able to confer with any of the people who had worked in some capacity on the reports. In this way, a truer picture of how familiar the librarians were with the publications was gained.

Interesting responses were received. Of those questioned, 77% knew that the library had the reports: 21% answered that they had never seen them; 2% were not sure whether the publications were located in the library or not. The primary use was found to be the referral of patrons to other collections. The majority felt that the reports were beneficial, although many had never used them!

After contacting various librarians, it was discovered that many of the branch libraries had not received the SAFARI Reports. The distribution process had always been handled through the central library, who received copies for each of its branches and was to distribute them accordingly. Furthermore, the reports were seldom handed out to the appropriate faculty mambers, other interested individuals, or even to the various departments in the library who could utilize them. A cover letter explaining the use of the reports had not been included in the first five publications. It was added to the last one with the hope that the copies would be dispersed properly.

Final Questionnaire

Following the telephone survey, a letter was sent to the heads of Reference Departments in the member libraries. It requested that the SAFARI Reports be brought to the attention of the staff, so that they would be able to objectively critique the reports at a future time. Three months later a final questionnaire was sent to twenty-four Department Heads, asking that they, with input from their staff, evaluate the benefits of the SAFARI Reports (See Appendix E). The Nursing SAFARI had not been distributed when the questionnaire was mailed, due to the necessity of including the feedback in the final grant report.

Of the ten questionnaires returned, all stated that they were now aware of the Reports. The rest of the results did not differ considerably from those received from the telephone survey. The primary use of the compilations, however, was given as receiving information about collections in other libraries. The general consensus, as in the previous poll, was that the publications were beneficial. The problem in putting much emphasis on the results is that only 41.6% of the questionnaires were returned, which was certainly not the feedback that was desired.

PHASE III

Following the completion of locating strong collections in six different subject areas in the Cleveland region, a questionnaire dealing with the first step towards resource sharing was distributed. It was sent to the Directors of those libraries which were determined to

be a resource library by means of the SAFARI Report on Education. Each sub-topic was written on a separate questionnaire, even though one library might receive several forms. Eight Directors received a total of sixty questionnaires. Seven Directors returned forty-four forms to the CAMLS Office. The largest public library did not respond, which must be kept in mind when assessing the overall support or non-support of the concept.

There were five difficulties which were cited when the questionnaires were returned. In the report, 'Catalogs' was mentioned as a subject strength. The Director of one library wanted further clarification as to the type of catalogs being discussed. A college library was listed as having two strong types of Educational materials, 'Early Childhood Education' and 'Career Information'. After checking their collection, it was discovered that they own only a few items on the first topic and that their materials of the latter are scattered throughout the college. Another college was listed as having a strength in 'Textbooks', wherein they noted that there is a library policy stating that collecting in this area is not to be done. This brings up questions as to discrepancies which might arise with information in the SAFARI Report. Finally, one college mentioned that in the area of 'Theses', they only collect those from their own institution.

Omitting these five responses, the thirty-nine questions can be broken down as follows (See Appendix F):

Question	Number of Responses	Percentage of Total Responses
1	1	2.5%
2	38	97.4%
3	27	69.2%
4	13	33.3%
5	26	66.6%
6	33	84.6%
7	34	87.1%
8	32	82 %
9	35	89.7%

SECTION IV - CONCLUSIONS

PHASE I

The check of titles listed in Choice did show that one library cannot exist alone. In order to fill patron requests, it must rely on other libraries in the area. The smaller collections supply materials, as do the larger ones. Each member library of CAMLS enriches the entire system, and likewise is helped by the collection strengths of the others.

The study did point out that the duplication of materials might be fairly widespread in certain fields. What about the pieces which are absent from the system entirely? Is it beneficial to overlap on numerous items, and yet not retain requested materials in even one member library? The results demonstrate the need for continued interlibrary loan service, as well as moving toward some form of coordinated purchasing program.

PHASE II

The completed questionnaires show that the general consensus is that the SAFARI Reports are useful. Interestingly, many of the librarians polled stated that the reports should continue, although they themselves had never had reason to use them. Often larger libraries felt that these compilations would be more beneficial for smaller libraries, since their collections could not supply as many materials to the patrons. On the other hand, the smaller libraries expressed the opinion that the bigger institutions would find the SAFARI Reports of greater value, since their users would expect more in-depth information and thus could be steered to further resources in the area.

The difficulties of actually evaluating the publications seems to stem from a lack of familiarity with them. When the telephone survey was conducted, it was discovered that many branch libraries and departments within the main or central library had never received copies. As a result, when the Nursing SAFARI was completed, it was distributed directly to every branch and every appropriate department. Of course, extra copies were available at any time through the CAMLS Office. This approach did assure proper distribution. Another tactic for increasing the visibility of the reports was conducted following the survey. A letter was sent to the heads of the reference departments in all of the member libraries. They were asked to re-acquaint their staffs with the SAFARI Reports. It was hoped that a renewed emphasis would be placed upon them. The reports were mentioned in the CAMLS Newsletter, which was published in October, 1977. The publications were included in the display which CAMLS had at the Ohio Library Association meetings in October, 1977.

A new consideration became apparent when the Nursing SAFARI Committee began working. Any specialized materials, such as nursing and law, are unique in that they are not commonly found in every library. They are not considered an essential part of a core collection. Many of these items are housed in places which have strict limitations on the usage of the materials. An inventory of nursing resources in the Cleveland area was conducted, and yet the committee realized that comparing subject strengths of collections which were primarily housed in institutions where the materials were not accessible to the public would not be beneficial. Therefore, the visits to libraries was omitted. It was also true that the majority of nursing materials were housed outside of the member libraries, excluding the Cleveland Health Sciences Library. This made it necessary to send Information Sheets to forty-eight institutions. The result was a report which did not exactly follow the SAFARI approach.

When venturing into SAFARI Reports on specialized materials, it is wise to evaluate the effectiveness of this technique for studying the collection. The compilation of nursing materials was fairly comprehensive, and could be quite beneficial to many libraries. However, it cannot be considered a SAFARI in the truest sense of the word.

Other methods might provide more information, considering the type of subject matter. Legal materials is an excellent example. The next SAFARI which was to be attempted after the one on nursing was one on law. When complications arose with the accessibility of nursing materials, the ability to discover what legal materials were in the Cleveland area came under question, as well as the idea of being able to visit them. Some of the main law libraries in the region maintain definite restrictions on not only the use of the library, but also how much information they could disseminate to a committee for publication. Also the problem of how many legal materials a library should have enters the picture. The difficulty was solved by a decision of the Library Resources Committee of CAMLS. They decided that a workshop on legal materials was much more feasible and desirable. The necessary information would be distributed, without entering into the realm of individual collections. This decision to use another method besides the SAFARI Report was very important. The SAFARI technique should only be adopted when the subject matter being examined is considered closely and proves to be conducive to this type of study.

There are four main points which the SAFARI Reports achieved: the testing of the SAFARI method, the interaction between committee members, patron usage, and the beginnings of resource sharing. First, it successfully tested the SAFARI technique. Six totally different topics were reviewed. For materials which are fairly common to many libraries, this fairly quick method is ideal. It provides a good picture of the location of the various resources in a region. It is not intended that a SAFARI be considered an in-depth qualitative evaluation of resources in the metropolitan area. That type of study requires a great deal more time. The area of Local History and Genealogy did suggest in the preface of the report that further work be conducted. The committee

on Business materials realized similar desires. They had gathered much more information than could easily be included in a SAFARI Report. The type of study which the committee envisioned was beyond the range of the SAFARI, and so the group stopped when an overall compilation of materials, primarily those housed in member libraries, was completed.

Secondly, a major benefit received was from the interaction of the individuals on the committees. All were specialists in a particular subject, and therefore their interests, as well as their problems in dealing with the materials, were similar. Working together broke down many barriers. It was easier to make contact with someone with whom a person had worked, and thus interlibrary cooperation grew in the best possible way - through the human resources of a library. The Music SAFARI Committee planned to continue meeting in order to share common interests, ideas and problems. Unfortunately, distance and the lack of time hampered their endeavor. Cooperation between libraries was definitely fostered by bringing together subject specialists from all types of libraries.

Another direct benefit of these reports is for the patrons. Librarians often see these publications as one more compilation which can go into a folder or drawer. A major aspect, which has been overlooked, is the usefulness these reports have for those working in the particular subject area. Besides being retained at the reference desk, copies should be distributed to those in collection development, acquisitions or the liasons with specific groups in the community or on campus. These individuals in turn could hand the reports out to people who would be interested in the type of information compiled. The patrons are still the group which the library is designed to serve. Furthermore, by seeing what is available in the Cleveland area, a user might begin to understand how vast the resources are to which he or she has access, and that a library's holdings include more than what is housed in one place.

Finally, the SAFARI Reports provided the initial steps to overcoming some of the obstacles towards resource sharing. Pooling materials and information does not mean losing a library's individuality. Rather, the library can expand its boundaries to include the materials which are available in a region.

PHASE III

The Resource Sharing Form provided some interesting feedback. Since 87.5% of the Directors answered, it is possible to get an idea as to their feelings towards resource sharing. The results were positive in that most were willing to continue collecting in their strong subject areas. There was a little more hesitancy towards the idea of notifying the CAMLS Office when journals are withdrawn, as well as towards the idea of continuing journals and/or adding new ones. The

smaller number of responses in those categories by no means signifies a rejection of the concept. It is extremely difficult for libraries to state their plans for maintaining journal subscriptions, when the costs are increasing so rapidly. With a carefully prepared plan, it would undoubtedly be possible to gain support on the reporting to the CAMLS Office when journals are withdrawn.

The largest public library in the area did not respond, and still 73.3% of the questionnaires were returned. Since so many Directors answered, this can certainly be regarded as a sign of interest in furthering the plans of resource sharing.

SECTION V - RECOMMENDATIONS

The recommendations which are a direct result of this study can be broken down into two major categories: continued efforts on collection study and resource sharing.

Collection study in the Cleveland area can build on the existing SAFARI Reports. There are two in particular, Local History and Genealogy and Business, which collected a great deal of information that was beyond the scope of the SAFARI Reports. An entire study could center on just one of these topics. For the subject area of Local History, the data collection would have to expand beyond the confines of the member libraries. Business could likewise follow a similar course, except perhaps the need would not be as great. In any case, the basic decision is whether the member libraries feel that it is necessary to extend an inventory into the Cleveland region.

Another approach would be to set up a study to do an in-depth evaluation of materials in the area, such as ethnic studies collections. The difference here is that no preliminary work has been done, and a SAFARI Report cannot be relied upon for information. Ethnic studies has been mentioned since Cleveland contains such a heterogeneous population. Furthermore, academic and public libraries have an interest in this field.

It is recommended that several in-depth studies be conducted. The SAFARI technique, at this point, would be useful if it was necessary to discover other subject strengths in the member libraries for purposes of delineating the responsibilities of resource sharing. By using this method, the process of assigning or dividing up fields can be simplified.

The logical corollary to the SAFARI Report is resource sharing. This is without a doubt the next step. There are many approaches to reaching this goal. The resource sharing forms demonstrated that compiling all of the subject strengths which have already been established by the SAFARI Reports would serve as a good beginning. The other fields could be divided according to a library's present acquisitions. As stated before, the SAFARI method could be used to further determine where the subject strengths lie, if necessary. A mechanism would then be set up whereby a library notifies the CAMLSOffice when journals in the specific field are cancelled, or when it is no longer possible to maintain the present level of the collection.

Whatever plan is drawn up, it is best not to attempt a comprehensive effort all in one move. It is much easier for the libraries to handle the changes step by step, and it is better to correct immediately any problems which might arise, rather than having to instigate a major reform. Careful planning, credibility and public relations are of the upmost importance when a plan for resource sharing between nineteen libraries is being formulated.

There is a proposal which CAMLS is presently working on that will greatly aid in resource sharing. A study is to be conducted concerning those interlibrary loan requests which cannot be filled by a library in CAMLS. Once these materials are identified, the question will be whether or not some library in the area should have the items. If the group decides to purchase all or some of them, the mechanism by which the process is carried out can be valuable for preparing a means of implementing resource sharing.

An inventory of collection resources is the first step that must be taken if members are to plan to share the collection responsibility by specializing in certain areas. This phase has been successfully accomplished by the SAFARI Reports, and they could continue being published, if necessary. The next phase, resource sharing, should now be addressed.

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APPENDIX

Appendix A

MEMBER LIBRARIES

Baldwin-Wallace College

Case Western Reserve University

Cleveland Health Sciences

Cleveland Heights-University Heights Public

Cleveland Public

Cleveland State University

Cuyahoga Community College

Cuyahoga County Public

Dyke College

East Cleveland Public

Euclid Public

John Carroll University

Lakewood Public

Oberlin College

Porter (Westlake) Public

Rocky River Public

Shaker Heights Public

St. Mary Seminary

Willoughby-Eastlake Public

Appendix B

SURVEY OF LIBRARY RESOURCES COMMITTEE

SUGGESTED SAFARI TOPICS QUESTIONNAIRE

Eighteen questionnaires sent to the committee
Twelve questionnaires were returned

SUBJECT	POSITIVE RESPONSE
By Form:	
Government Documents	12
Vertical File	10
By Subject:	
Local History	11
Law	10
Science	9
Nursing	8
Psychology	8
Religion	8
Fine Arts	7
Genealogy	7
Sports	6

Appendix C

RESOURCE SHARING QUESTIONNAIRE

One of the main objectives of the Title II-B grant is to study the possibilities of resource sharing in the Cleveland area. The initial step taken was to locate the collections which had specific subject strengths. This has been accomplished in six different fields. The next phase is to have the Directors of those libraries which were determined to be a Resource Library by means of the SAFARI Report in Education to complete the following questionnaire.

SUBJECT STRENGTHS: Example: Early Childhood Education

A CAMLS Resource Library is one which:

1. Has been determined, by a SAFARI Team or other survey, to have the strongest or one of the strongest collections in CAMLS in a subject area or form of material. Generally subjects and forms will be specific rather than general areas.

2. Is willing to agree to continue to collect in this area or form under the following general conditions:

Will do the following (Check one, or more if appropriate):

_____ Collect in more depth than at present, as a strong collection

_____ Collect in approximately the same depth as at present

_____ Continue existing journal subscriptions

_____ Continue existing journal subscriptions and add important new journals

_____ Agree not to withdraw any journal or continuation file in this field without notifying the CAMLS Office or Chairperson of the Library Resources Committee

_____ Notify the CAMLS Office or Chairperson of the Library Resources Committee if the Library can no longer continue to support the collection at the level stated above

_____ Respond to interlibrary loan requests in this area, to the normal extent

_____ Permit qualified and properly identified users of other member libraries to use the collection upon request of another library (privilege to be restricted to bona fide serious users)

_____ Respond on request to inquiries about holdings and orders from collection development librarians of member libraries, in order to avoid unnecessary Systemwide duplication of specialized and/or expensive holdings.

Appendix C - 2

In return, a CAMLS Resource Library will receive the following:

1. Reciprocal privileges in other subject (or form) areas from other Resource Libraries

2. Avoidance of inappropriate referrals

3. Referral of suitable users; appropriate publicizing of collection

4. Referral to Resource Library of would-be donors of appropriate materials, collections, etc., from other libraries which are not attempting to collect in these fields

5. Offers of appropriate withdrawn materials (short runs of journals to fill in, etc.) from member libraries

6. Financial assistance in collection building, in the event that CAMLS receives funds at any future time for materials in sufficient amount to provide such assistance.

COMMENTS:

LIBRARY: _____

SIGNED BY: _____

DATE: _____

Appendix D

CAMLS TELEPHONE SURVEY - COMPILATION OF RESULTS

Libraries Contacted

TOTAL RESPONSES

18 Academic Libraries
26 Public Libraries

44 Position in Library: Reference Librarians - 33
Subject Specialists - 4
Head Librarians - 3
ILL Librarians - 2
Ref./ILL/Acquisitions - 1
Reference/ILL - 1

44 1. Do you have the CAMLS SAFARI Reports?

yes 34 no 9 not sure 1

35 2. Where are they kept?

reference desk 11 reference collection 9

office 6 : bibliographer's - 1
head librarians's - 1
reference dept.'s - 3
various offices - 1

other 9 :not sure - 5
Vertical File - 2
Adult Room File - 1
CAMLS Central File - 1

34 3. Do you use any of them?

yes 17 no 17

15 4. If yes, how often? (Answered only in the broadest terms)

frequently 1 infrequently 13 weekly 1

17 5. If yes, for what purposes are they used?

15 Referral of patrons to other collections
1 Sent to branches
1 Locate specific materials (Not referral)

Other purposes given in conjunction with referring patrons: (Not counted)

1 Mailing subject bibliographies to other libraries
1 Collection Development

CAMLS TELEPHONE SURVEY - COMPILATION OF RESULTS (con't)

TOTAL RESPONSES

17 6. If no, what is the reason for the lack of use?

6	There is no need
5	Never considered using them
3	Always use loop or go direct for ILL
2	Specialized library, SAFARIs are not pertinent to collection
1	Familiar with sources, since went on the one SAFARI which is pertinent to library's collection

9 7. Are patrons made aware of these publications?

no 8 Only when used as referral for patron 1

24 8. Do you feel that the SAFARI Reports are useful?

(Replies which were not just "yes" or "no" are listed below)

13	yes - includes:	11	no - includes:
1	smaller libraries would probably use them	5	specialized library, Reports not pertinent to collection
1	well done, but not used much	1	quantitative, but should be qualitative

7 9. Do you have any suggestions for improvements?

1	always list hours open and circulation policy on profiles
1	workshops to follow up on subject materials in the area
1	list exact branch where information is located (already done that way)
1	more complete explanation on filling out the Information Sheet
1	more SAFARI Reports
1	use standard bibliography as base for Report
1	list library strengths geographically, as well as by subject

Suggestions after completing the survey:

1. In the future it might be beneficial to send the Reports directly to each of the branch libraries. It has been the practice to send all of the copies to the main libraries, leaving them with the responsibility and time-consuming task of dispersing the publications. As a result, it seems that some of the branch libraries have received the materials, while others in the same system have not.

2. A cover letter explaining the SAFARIs and accompanying the Reports might be more informative to the recipient of the publication than merely receiving the piece in the mail.

Appendix E

CAMLS QUESTIONNAIRE ON SAFARI REPORTS - COMPILATION OF RESULTS

24 questionnaires were distributed

TOTAL RESPONSES

3 Academic Libraries Returned Questionnaires

7 Public Libraries Returned Questionnaires

10 Position in Library:

Coordinator Librarians	- 1
Reference Librarians	- 2
Heads of Reference Departments	- 3
Directors	- 1
Reference Specialists	- 2
Heads of Adult Information Services	- 1

10 1. Do you have the CAMLS SAFARI Reports:

yes 10

12 2. Where are they kept?

reference desk 8 reference collection 1

office 2 other 1 : Extension office -1

10 3. Do you use any of them?

yes 7 no 3

7 4. If yes, how often? (answered only in the broadest terms)

infrequently 2 once or twice 1

monthly 1 three-four times weekly 1

10 5. If yes, for what purposes are they used?

3 Referral of patrons to other collections
5 Information concerning collections in other libraries
1 Hours
1 General interest in the subject areas

Appendix E - 2

CAMLS QUESTIONNAIRE ON SAFARI REPORTS - COMPILATION OF RESULTS (cont.)

TOTAL RESPONSES

5 6. If no, what is the reason for the lack of use?

2 Topics are not in the library's subject area (specialized library).
1 Patrons don't come to this library for highly specialized materials
2 Not needed

10 7. Are patrons made aware of these publications?

yes 2 no 7

only if patron could be helped by them 1

9 8. Do you feel that the SAFARI Reports are useful?

perhaps 2

Replies which were not just "yes" or "no" are listed below)

6 yes - includes:
1 mainly for academic libraries
1 more useful in public libraries

1 no - includes:
1 lacks specifics, most value in visiting collections

8 9. Should a mechanism be built in to update these Reports annually?

yes 3 no 1

every five years 1 every two years 1

notification of major changes to Reports 1

some need more updating than others 1

2 10. Do you have any suggestions for improvements?

1 re-issue Education SAFARI Report with format and detail similar to others
1 format good, but patrons should be aware of these publications

Appendix E - 3

CAMLS QUESTIONNAIRE ON SAFARI REPORTS - COMPILATION OF RESULTS (cont.)

TOTAL RESPONSES

7 11. Should discussion groups or workshops be conducted on the subject materials as a follow up? If yes, who should these meetings be for?

yes 2 no 4

1 meetings for professional level for knowledge of specialized materials and for cooperative purchasing

6 12. Should these be continued?

yes 4 no 2

Appendix F

RESOURCE SHARING QUESTIONNAIRE - REPLIES

Sent to the Directors of the following libraries:	Number of Questionnaires Sent	Number of Questionnaires Returned
Baldwin-Wallace College	5	5
Case Western Reserve University	12	12
Cleveland Heights-University Heights Public	5	5
Cleveland Public	16	-
Cleveland State University	10	10
Cuyahoga Community College	2	2
Cuyahoga County Public	2	2
John Carroll University	8	8
TOTAL	60	44

Appendix F - 2

RESOURCE SHARING QUESTIONNAIRE

RESULTS

	Number of Responses	Percentage of Total Responses
1. Collect in more depth than at present, as a strong collection	1	2.5%
Cleveland State University - 1		
2. Collect in approximately the same depth as at present	38	97.4%
Case Western Reserve University -12 Cleveland State University - 9 John Carroll University - 6 Baldwin-Wallace College - 5 Cleveland Heights-University Heights Public - 4 Cuyahoga County Public - 2		
3. Continue existing journal subscriptions	27	69.2%
Case Western Reserve University -12 Cleveland State University -10 Baldwin-Wallace College - 3 Cuyahoga County Public - 2		
4. Continue existing journal subscriptions and add important new journals	13	33.3%
Case Western Reserve University -12 Cleveland State University - 1		
5. Agree not to withdraw any journal or continuation file in this field without notifying the CAMLS Office or Chairperson of the Library Resources Committee	26	66.6%
Case Western Reserve University -12 Cleveland State University -10 Baldwin-Wallace College - 3 Cuyahoga County Public - 1		
6. Notify the CAMLS Office or Chairperson of the Library Resources Committee if the Library can no longer continue to support the collection at the level stated above	33	84.6%
Case Western Reserve University -12 Cleveland State University -10 John Carroll University - 6 Baldwin-Wallace College - 3 Cuyahoga County Public - 2		

Appendix F - 3

RESOURCE SHARING QUESTIONNAIRE

RESULTS (cont.)

	Number of Responses	Percentage of Total Responses
7. Respond to interlibrary loan requests in the area, to the normal extent	34	87.1%
Case Western Reserve University -12 Cleveland State University - 8 John Carroll University - 6 Baldwin-Wallace College - 3 Cleveland Heights-University Heights Public - 3 Cuyahoga County Public - 2		
8. Permit qualified and properly identified users of other member libraries to use the collection upon request of another library (privilege to be restricted to bona fide serious users)	32	82 %
Case Western Reserve University -12 Cleveland State University -10 Baldwin-Wallace College - 5 Cleveland Heights-University Heights Public - 3 Cuyahoga County Public - 2		
9. Respond on request to inquiries about holdings and order from collection development librarians of member libraries, in order to avoid unnecessary Systemwide duplication of specialized and/or expensive holdings.	35	89.7%
Case Western Reserve University -12 Cleveland State University -10 John Carroll University - 6 Baldwin-Wallace College - 5 Cuyahoga County Public - 2		

Appendix F - 4

RESOURCE SHARING QUESTIONNAIRE

RESULTS (cont.)

COMMENTS

Baldwin-Wallace College

Curriculum materials and Textbooks are not under the library's jurisdiction. Therefore, although listed that would cooperate, the library cannot say for sure.

Cleveland Heights-University Heights Public

Lists 'Catalogs' as subject strength in SAFARI Report, but further clarification is needed before a questionnaire could have been returned on this topic

Cuyahoga Community College

Report lists 'Career Information' as a subject strength, but according to the college these materials are scattered throughout the institution, and it is impossible to say how much material there really is.

Report lists 'Childhood Education' as a subject strength, but there are only a few books on this topic at the college.

John Carroll University

Report lists 'Textbooks' as a subject strength, but the library has a policy that they do not collect in this area.

A questionnaire was not filled out with John Carroll as having a subject strength in 'Theses', since they wanted to specify that the theses which are collected are limited to the ones from their own university.